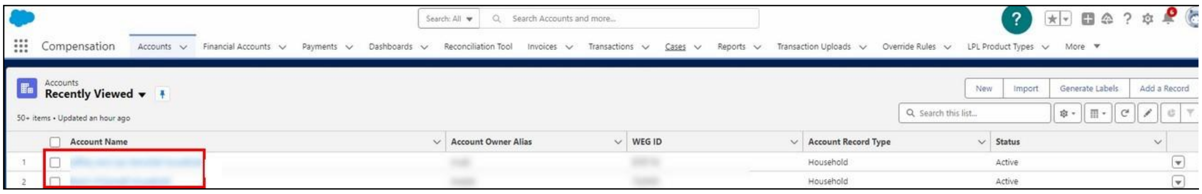
Process – Advisor Team Submission

1. **Team Opens Client Refund Case**



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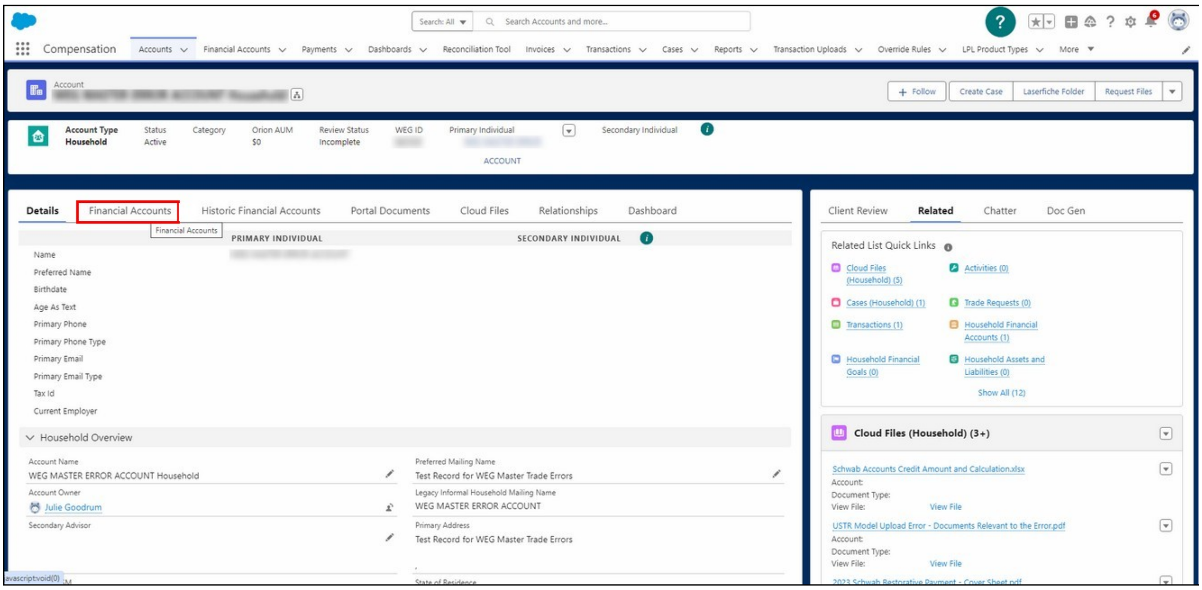
Action Step
1. Launch Salesforce and go to the **Accounts Tab - Recently Viewed** list. 2. Choose an account from the list and double click on the **Account Name** or type in a WEG ID in the **Search Bar** and press **Enter**.

2. **Client Household | Account | Salesforce** screen is displayed.



Step	Action
1	Select the **Financial Account** Tab